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FEE PROPOSAL

TO PROVIDE DEVELOPMENT CONSULTANT SERVICES
FOR THE DEVELOPMENT OF
A CHINATOWN COMMUNITY SERVICE FACILITY

Submitted to:

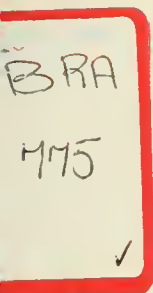
Pancho Chang, Chairman
Chinatown Community Center
c/o PEACH Corp.
322 Tremont Street
Boston, MA 02116

Submitted by:

Jonathan G. Truslow
Development Consultant
11 Belmore Terrace, Jamaica Plain, MA 02130

October 2, 1989





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Preface

This proposal is being submitted in response to a request for proposals to provide development consultant services to the Chinatown Community Center, a non-profit organization consisting of seven human service agencies serving the Asian community, which will oversee the development of a 90,000 square foot community service facility to be constructed on "Parcel C" in Chinatown as part of Boston's parcel-to-parcel linkage program.

The opportunity to construct the Chinatown Community Center is historic for a number of reasons. It represents an acknowledgment by the City of Boston that the Asian community, in comparison to other Boston neighborhoods, has historically received less than its fair share of public funds to meet its housing and human service needs. More importantly, it represents a commitment by the City to redress this balance by providing linkage funds in an amount sufficient to fully develop and construct a 90,000 square foot community center to serve the Asian community's service needs. The innovative leadership demonstrated by the Mayor and the Director of the Boston Redevelopment Authority in providing a practical funding mechanism to realize this commitment is commendable.

Also to be commended is the Asian community itself for bringing together its major human service organizations in a cooperative process to identify its needs and negotiate effectively with the City to see them met through the current proposal for a Chinatown community center.

The incorporation of the Chinatown Community Center non-profit organization is the next step in formalizing this process and creating a community-controlled vehicle that can turn these broad-brush concepts into a reality that truly serves the needs of the Asian community.

Development Tasks

During the next 12 to 18 months, a number of tasks must be accomplished in order to meet this goal:

1. The Chinatown Community Center organization must be incorporated with a charter that gives it the power to develop, and possibly own, the new community service facility.
2. A Development Consultant must be hired who can act as staff to the new organization, performing community organizing and communication functions as well as development project management functions. These functions would include:

- o Establishing a Chinatown Community Center (CCC) office in the community and hiring a secretary and a project management assistant;
 - o Holding regular meetings of the CCC Board -- developing agendas, disseminating project information, obtaining member agency input, proposing action timetables, obtaining approvals, etc.;
 - o Representing the CCC at meetings with the various public agencies involved with the development of the community facility;
 - o Hiring, supervising and coordinating activities of other professionals on the development team;
 - o Preparing capital and operating budgets for the community facility;
 - o Coordinating the space planning of the facility with individual service agencies and the architect; and
 - o Performing project management duties, which will include evaluating development finance plans for the community facility and their impacts upon the participating agencies.
3. A capital budget for development of the community facility must be developed within the limit of the funds available;
 4. A development schedule must be prepared showing the timing of critical path activities by all actors in the process and the level of resources needed at each step of the process;
 5. An architectural firm must be selected to design the community facility;
 6. Traffic, geotechnical, site surveying, site design and other technical studies must be prepared;
 7. Space planning for the facility must be refined, based upon both the needs of participating agencies and their capacity to carry the operating costs of the space allocated to them;
 8. An operating budget for the facility must be developed that realistically projects expenses and revenues available to cover them;

9. The design of the facility must be reviewed and approved at each phase (Schematic Design, Design Development, and Working Drawings) to determine if it meets the design requirements and can be built within the approved capital budget;
10. A contractor must be selected and decisions made about the best contractual arrangements to insure the CCC and the BRA that construction will be performed on time and on budget, meeting the construction standards of quality agreed upon.

These development tasks are listed to give some sense of the scope of the work that must be managed by the Development Consultant during the period in question.

Fee Proposal

40 hrs/wk = 6 mos. \$150/hr or 50/hr
20 hrs/wk = 12 mos.

To oversee the accomplishment of these tasks, I propose to offer my services as Development Consultant to the Chinatown Community Center.

To be successful, I believe the CCC needs not just an outside consultant to advise on development matters but someone who can act as staff to the CCC, giving attention to the communication process necessary to effectively coordinate the participating agencies during the development phase and building an organization that will remain strong and viable through construction and into the operating phase of the new facility.

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Accordingly, I propose to set up an office for the CCC in Chinatown and hire a secretary and an project assistant from the Chinatown community. I would act as an Executive Director for the CCC during the term of my contract. My staff would be hired with no guarantee of employment beyond the end of my contract but with an understanding that the CCC would attempt to retain them into the construction and operating phases of the facility.

The personnel costs for myself, two employees, and accounting/auditing services would total \$256,730 over an 18-month period. The non-personnel costs over the same period would amount to \$128,575 (if no space, equipment or supplies were contributed by member agencies) for a total contract cost of \$385,305. This budget is exclusive of funds for project consultants, e.g., architects, engineers, and others. (See Table 1 - 18-Month Development Consultant Budget & Pro Forma With No Member-Agency Contributions.)

The non-personnel costs of the contract could be reduced in a number of ways:

o Office Space

My budget provides for leasing 1,500 SF at \$22.50/SF. This is enough space for three employees, a generous conference room, and some expansion room. If board members would be willing to meet in conference space of member agencies, we could lease space without a conference room. If establishing a "presence" for the CCC by leasing separate office space is not a priority, space might be sublet at a lower rate, or contributed rent-free, by a member agency. In such a case, insurance, rent, and utility costs would be reduced proportionally.

o Equipment

Similarly, my budget calls for buying office equipment on the assumption that such equipment would become the property of the CCC and be used by it after the community service center is up and operating. Especially if space were contributed by or sublet from a member agency, an alternative would be to use or share equipment of the agency in which the office is housed.

o Supplies and Meeting Expenses

Finally, certain supplies, postage and meeting expenses could be contributed by the host agency or member agencies to further reduce non-personnel costs during the contract period.

An example of how such costs could be reduced is shown in Table 2 - 18-Month Development Consultant Budget With Zero, Minimum & Maximum Member-Agency Contributions.

In summary, I propose an 18-month contract to provide the services outlined under Item #2 (page 2) above. The fee for these services would consist of \$256,730 to cover personnel expenses and a negotiated amount between \$128,575 and \$45,145 for non-personnel operating expenses, the final amount depending upon the level of participating agency contributions to these operating costs. The fee would be paid in monthly installments after an initial payment of \$100,000 to cover start-up expenses.

I hope you will give my proposal serious consideration and look forward to your response.

Respectfully yours,

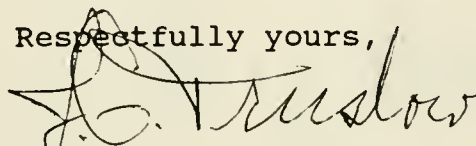

Jonathan G. Truslow

Table 1

18-MONTH DEVELOPMENT CONSULTANT BUDGET & PRO FORMA WITH NO MEMBER-AGENCY CONTRIBUTIONS

Category/Item	1	2	3	4	5	6	7	8	9	10	11	12	12-Month Total	13	14	15	16	17	18	18-Month Total
1.0 PERSONNEL COSTS:																				
1.1 Salaries																				
Brec. Dir./Dev. Consult	75000	6,250	6,250	6,250	6,250	6,250	6,563	6,563	6,563	6,563	6,563	6,563	76,875	6,891	6,891	6,891	6,891	6,891	6,891	118,219
Project Assistant	30000	2,500	2,500	2,500	2,500	2,500	2,625	2,625	2,625	2,625	2,625	2,625	30,750	2,756	2,756	2,756	2,756	2,756	2,756	47,288
Secretary/bookkeeper	22000	1,833	1,833	1,833	1,833	1,833	1,925	1,925	1,925	1,925	1,925	1,925	22,550	2,021	2,021	2,021	2,021	2,021	2,021	30,678
Total	127000	10,583	10,583	10,583	10,583	10,583	11,113	11,113	11,113	11,113	11,113	11,113	130,175	11,668	11,668	11,668	11,668	11,668	11,668	200,184
1.2 Benefits	0.25	2,646	2,646	2,646	2,646	2,646	2,778	2,778	2,778	2,778	2,778	2,778	32,544	2,917	2,917	2,917	2,917	2,917	2,917	50,046
1.3 Accounting/auditing service		250	250	250	250	250	250	250	250	250	250	250	3,000	250	250	250	250	250	250	6,500
Total Personnel Costs		13,479	13,479	13,479	13,479	13,479	14,141	14,141	14,141	14,141	14,141	14,141	165,719	14,835	14,835	14,835	14,835	14,835	14,835	256,730
2.0 NON-PERSONNEL COSTS																				
2.1 Insurance	400	33	33	33	33	33	33	33	33	33	33	33	400	33	33	33	33	33	33	600
2.2 Rent	22.5	2,813	2,813	2,813	2,813	2,813	2,813	2,813	2,813	2,813	2,813	2,813	33,750	2,813	2,813	2,813	2,813	2,813	2,813	50,625
Rent (incl. conf. rm)	1500																			13.18
2.3 Utilities																				
Rent (in rent)																				
Water/Sewer (in rent)																				
Electricity (+ a/c)	500	100	100	100	100	100	150	200	300	300	200	150	1,900	100	100	100	100	100	100	2,500
Telephone		500	500	500	500	500	500	500	500	500	500	500	6,000	500	500	500	500	500	500	9,000
Total		600	600	600	600	600	650	700	800	800	700	650	7,900	600	600	600	600	600	600	11,500
2.4 Equipment																				3,000
Furniture	10000												10,000							10,000
Computer Hardware	12000												12,000							12,000
Computer Software	2000												2,000							2,000
Printers	3000												3,000							3,000
Copier Machine	6000												6,000							6,000
PAB machine	1200												1,200							1,200
Typewriter	1200												1,200							1,200
Postage Meter (lease)	300	25	25	25	25	25	25	25	25	25	25	25	300	25	25	25	25	25	25	450
Telephones	2000												2,000							2,000
Misc. (incl. a/c)	1500												1,500							1,500
Equip. Svc. Contracts	1800	150	150	150	150	150	150	150	150	150	150	150	1,800	150	150	150	150	150	150	2,700
Total	41000	39,075											41,000							42,050

Table 1

18-MONTH DEVELOPMENT CONSULTANT BUDGET & PRO FORMA WITH NO MEMBER-AGENCY CONTRIBUTIONS

JG7: 10/2/89

Category/Item	1	2	3	4	5	6	7	8	9	10	11	12	12-Month Total	13	14	15	16	17	18	18-Month Total	19
2.5 Supplies																					
Letterhead & envelopes	500	200	200	200	200	200	200	200	200	200	200	200	2,400	200	200	200	200	200	200	200	500
PAX & Copier supplies	2400	100	100	100	100	100	100	100	100	100	100	100	1,200	100	100	100	100	100	100	100	1,600
Computer supplies	1200	100	100	100	100	100	100	100	100	100	100	100	1,200	100	100	100	100	100	100	100	1,600
Postage	2100	175	175	175	175	175	175	175	175	175	175	175	2,100	175	175	175	175	175	175	175	3,150
Misc.	5000	250	250	250	250	250	250	250	250	250	250	250	4,750	250	250	250	250	250	250	250	6,250
Total	11200	2,975	725	725	725	725	725	725	725	725	725	725	10,950	725	725	725	725	725	725	725	15,300
2.6 Publications/Memberships	2000												2,000	2,000							4,000
2.7 Travel/Conferences	2400	200	200	200	200	200	200	200	200	200	200	200	2,400	200	200	200	200	200	200	200	3,600
2.8 Board Meeting Expenses	600	50	50	50	50	50	50	50	50	50	50	50	600	50	50	50	50	50	50	50	900
Total Non-Personnel Costs	47,746	4,421	4,421	4,421	4,421	4,421	4,471	4,521	4,621	4,621	4,521	4,471	99,000	6,421	4,421	4,421	4,421	4,421	4,421	4,421	128,575
3.0 TOTAL OPERATING COSTS	61,225	17,900	17,900	17,900	17,900	17,900	18,611	18,661	18,761	18,761	18,661	18,611	264,719	21,256	19,256	19,256	21,256	19,256	19,256	19,256	385,305

Table 2

18-MONTH DEVELOPMENT CONSULTANT BUDGET
WITH ZERO, MINIMUM & MAXIMUM MEMBER-AGENCY CONTRIBUTIONS

	<u>Category/Item</u>	<u>With Zero</u> <u>Contrib.</u>	<u>With Min.</u> <u>Contrib.</u>	<u>With Max.</u> <u>Contrib.</u>
1.1	Salaries:			
	Exec. Dir./Dev. Consult	118,219	118,219	118,219
	Project Assistant	47,288	47,288	47,288
	Secretary/bookkeeper	34,678	34,678	34,678
1.2	Benefits	50,046	50,046	50,046
1.3	Accounting/auditing service	6,500	6,500	6,500
2.1	* Insurance	600	0	0
2.2	* Rent	50,625	24,000	0
2.3	Utilities:			
	Heat (in rent)	0	0	0
	Water/Sewer (in rent)	0	0	0
	* Electricity (+ a/c)	2,500	0	0
	Telephone	9,000	9,000	9,000
2.4	Equipment:			
	* Furniture	10,000	5,000	0
	Computer Hardware	12,000	12,000	12,000
	Computer Software	2,000	2,000	2,000
	Printers	3,000	3,000	3,000
	* Copier Machine	6,000	0	0
	* FAX machine	1,200	0	0
	* Typewriter	1,200	0	0
	* Postage Meter (lease)	450	0	0
	* Telephones	2,000	0	0
	Misc. (incl. a/c)	1,500	1,500	1,500
	* Equip. Svc. Contracts	2,700	1,500	1,500
2.5	Supplies:			
	Letterhead & envelopes	500	500	500
	* FAX & Copier supplies	3,600	3,600	0
	Computer supplies	1,800	1,800	1,800
	* Postage	3,150	3,150	0
	Misc.	6,250	6,250	6,250
2.6	Publications/Memberships	4,000	4,000	4,000
2.7	Travel/Conferences	3,600	3,600	3,600
2.8	* Board Meeting Expenses	900	900	0
3.0	TOTAL OPERATING COSTS	385,306	338,531	301,881

 * Budget categories in which need for linkage funds could be reduced by member-agency contributions of space, equipment and supplies.

JOB QUALIFICATION STATEMENT
of
Jonathan G. Truslow

From my 20 years of working for community organizations, non-profit housing developers, public planning agencies, private developers and healthcare corporations in the Boston area, I have gained a breadth and depth of experience that is directly relevant to the job requirements for a development consultant to the Chinatown Community Center organization.

I have worked with numerous non-profit community organizations that were unfamiliar with real estate development. I was responsible for providing assistance to community organizations on real estate development issues in my jobs with the Center for Community Economic Development, the East Boston Community Development Corporation, the Boston Redevelopment Authority and the Metropolitan Area Planning Council. In some cases these groups wanted to develop housing and other needed facilities, while in others they wanted to control or stop developments they felt would negatively impact their communities. In each case my job was to find out what the group wanted and help them understand how to achieve it.

My experience in East Boston is a relevant example. I was hired by the board of a non-profit community organization to assist them in preparing a grant application to establish a community development corporation. Most of my effort was devoted to working with board members, understanding the needs of their community, helping them to formulate programs to address the community's needs, explaining the mechanisms available to do so, advising them on the advantages and disadvantages of various approaches in terms of the board's objectives, and training staff hired from the community to effectively implement the strategies we jointly developed. My personal goals were achieved when I had worked myself out of a job by helping them establish the East Boston Community Development Corporation, which was controlled and staffed by community members, and launching its first ventures.

As indicated in the attached resume, I have an excellent knowledge of real estate development issues. I have a Masters Degree in International Relations with a focus on economic development and I have taken professional development courses in real estate financial analysis and in housing and health care environments for the aging.

As a planner at the Boston Redevelopment Authority and as the Director of Planning at the Metropolitan Area Planning Council I became thoroughly familiar with the regulatory process involved in real estate development. As a project manager at the Planning Office of Urban Affairs of the Archdiocese of Boston, I managed the development of low and moderate income

housing and most recently, as the senior project manager at The Mediplex Group, I had direct responsibility for managing the development of nursing homes and lifecare community projects ranging from \$6 million to \$40 million in value, taking them from site acquisition through design and local approvals to financing and construction. My strength in this area is such that if the Chinatown Community Center organization wanted to act as its own developer of the new community service facility, I would feel confident in managing this effort for them.

I do not have experience working with the Asian American community in Boston or with the human service/community agencies participating in the development of Parcel C. However, as my experience in East Boston demonstrates, I believe I have the ability to work effectively with people of different cultural backgrounds. I know how to develop consensus among different groups and how to lead them through the practical steps of coordinating their actions to achieve a common goal.

In summary, I believe I have the skills, experience and commitment to effectively deliver the consulting services your organization will need to realize the very possible dream of building the Chinatown Community Center.

JONATHAN G. TRUSLOW
11 Belmore Terrace
Jamaica Plain, MA 02130
(617) 522-3547

PROFESSIONAL
EXPERIENCE:

Development Consultant (Self-Employed)

8/89 - present

Currently managing sale of surplus properties for The Mediplex Group.

Senior Project Manager

4/85 - 7/89

The Mediplex Group, Inc., Wellesley, MA

*Life care projects
in African,*
Managed of all phases of development of \$6-\$40 million nursing home and lifecare community projects for own account and for turnkey clients. Analyzed markets and determined feasibility. Selected and acquired sites. Worked with clients to define building programs. Negotiated, awarded and administered contracts with project attorneys, architects and consultants. Obtained zoning and all other approvals necessary to begin construction. Prepared and maintained project schedules and budgets. Supervised preparation of construction documents. Coordinated projects through financing and construction.

Housing Developer/Consultant (Self-employed)

1/84 - 4/85

Prepared housing development feasibility studies for private clients and developed a single-family home in Boston.

Planning Director/Deputy Executive Director

6/77 - 12/83

Metropolitan Area Planning Council, Boston, MA

Supervised staff of 20 professional planners, landscape architects and engineers providing consulting services to local government officials in the Boston metropolitan area on housing, economic development, land use and environmental quality issues. Developed agency work programs and budgets, prepared funding proposals, maintained liaison with grantor agencies, and approved all A-95 and MEPA reviews prepared by MAPC staff.

City Planner

11/74 - 6/77

Boston Redevelopment Authority and
Mayor's Office of Program Development

Conducted studies of neighborhood needs and reviewed all public and private development proposals in East Boston, Charlestown and So. Boston waterfront area. Assisted neighborhood organizations, brokered local development issues, developed capital improvement programs, prepared Community Development Block Grant applications, and monitored implementation of funded programs.

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JONATHAN G. TRUSLOW
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EXPERIENCE
(CONTINUED):

Project Manager 4/72 - 11/74
Planning Office for Urban Affairs. Archdiocese of Boston

Managed development of over 400 units of mixed-income, limited-equity cooperative housing from program development through site selection, design, approvals and financing to construction.

Special Assistant to Director 2/71 - 4/72
East Boston Community Development Corporation. E. Boston, MA

Co-authored successful \$1.3 million grant application to capitalize and operate the East Boston CDC. Supervised incorporation of the CDC, and assisted in hiring local staff, acquiring land for first venture, and launching other CDC programs.

Program Analyst 9/69 - 1/71
Center for Community Economic Development, Cambridge, MA

Management Intern 6/68 - 8/68
First National City Bank, Panama City, Panama

Lieutenant, U.S. Naval Reserves 6/63 - 8/66
Active-duty line officer on a Destroyer in the Pacific Fleet

EDUCATION:

Housing and Health Care Environments for the Aging, Professional Development Course, Harvard Graduate School of Design (1987)

Real Estate Financial Analysis, Professional Development Course, Harvard Graduate School of Design (1984)

M.A., International Relations (Economic Development), Johns Hopkins School of Advanced International Studies, Washington, D.C. (1969)

Certificate in Political Studies, L'Institut d'Etudes Politiques, Paris, France (1967)

B.A., American Studies, Yale University, New Haven, CT (1963)

SPECIAL SKILLS:

IBM PC Compatible Software: project management (PROMIS), spreadsheets (Lotus), wordprocessing (MultiMate), database (dBASE), etc.

Languages: fluent in French with a reading proficiency in Spanish and Portuguese.

References furnished upon request.

